Government of Western Australia
Department of Housing

OPENING DOORS
To Affordable Housing

Support and Tenant Education Program Information Management System (STEPIMS)

User Guide – Agency Users

Contents

INTRODUCTION 3

What is STEPIMS? 3
Access Levels 3

CONFIDENTIALITY OF INFORMATION 4
PASSWORD SECURITY 4
LOGGING ON TO STEPIMS 4
TRAINING AND PRODUCTION DATABASES 5

Log On Screen 5
Notifications Screen 6

HOME PAGE 7

Display Information – Agency, Database and User Details 7
General Navigation 7
Mandatory Fields 8
Date Fields 9
Drop Down Lists 9
Large Text Fields 9

TO SEARCH FOR A CASE 10

CASE - Menu Option 10

Home Page 10
Case – Search 10

TO EDIT AND UPDATE A CASE 13

HOME - Menu Option 13

My Cases Summary 13
Last 5 Log Comments 14
Program - Assessment 14
Survey Score and Tenant Confidence 15
Program - Accepted 16
Program – Review 17
Program – Exit 18
Survey Score and Tenant Confidence 19

AGENCY MANAGER 20

HOME - Menu Option 20

Case Summary Filter 21
Case Summary For All Agency Users: 21
Agency Case Summary 23
Agency / Housing Office Case Breakdown 23
Search Results 25
Last 5 Log Comments 25

USER - Menu Option 26

User List Filters 26
Job Title History 28

REPORT - Menu Option 29

INTRODUCTION

What is STEPIMS?
The *Support and Tenant Education Program Information Management System* (STEPIMS) is a customised electronic case management system used to record and access details of STEP cases.

As STEPIMS is a web based system and can be accessed using a web browser, a live internet connection is required.

STEPIMS is optimised for Windows PCs using Internet Explorer 9 but will operate on other browsers i.e., Apple Mac systems, tablets and smartphones.

Access Levels
There are three different levels of access to STEPIMS for Service Providers:

- **Agency Case Enquiry** - read access only with no ability to update records – designed for STEP Provider Administration/Reception staff.
- **Agency Case Officer** – search, edit and update client records.
- **Agency Manager** – same as Agency Case Officer and in addition ability to access reports, edit user details and end user access, delete log comments and expected end dates.

There are four different levels of access to STEPIMS for the Department of Housing Staff:

- **Housing ICT** - create and edit user records with the ability to view reports
- **Housing Case Enquiry** – read access only with no ability to update records
- **Housing Officer** – search, add, edit client records
- **Housing Manager** – same as Housing Officer and in addition ability to approve referrals; access reports and manage user accounts
- **Administrator** – access to all functionality of STEPIMS

CONFIDENTIALITY OF INFORMATION

There is no legislative right to privacy in Western Australia and the *Housing Act 1980* does not create a duty of confidentiality between the Department of Housing and a customer. The Department, however, believes that it has a corporate responsibility to maintain the privacy and confidentiality of the tenants; hence the department follows the *National Privacy Principles* administered by the Office of The Australian Information Commissioner.

On this basis, the Department of Housing requires STEP Providers to enter into a confidentiality agreement prior to accessing STEPIMS. This is to ensure that personal information about the tenant is used only for the purposes of providing STEP assistance, managing the tenancy and to undertake program evaluation.

PASSWORD SECURITY

STEPIMS users should not disclose their password to anyone and should only use their own account to access the system. If you suspect that someone has obtained access to your password, contact the Department of Housing immediately to have your password changed.

If you have forgotten your username or password, or your password needs to be reset, contact the Department of Housing's IT Help Desk on 1300 791 022. Advise the Help Desk that you are an external user and provide the answer to your secret question to verify your identity.

LOGGING ON TO STEPIMS

Access to the STEPIMS is provided by the Department of Housing. New users will need to complete the *"STEPIMS Access Request"* form. This form includes the confidentiality agreement mentioned above and is available on the STEP web portal – Resources and Templates: http://www.housing.wa.gov.au/stepportal/pages/step.aspx.

STEPIMS has two main databases which can be accessed by STEP Providers:

- STEPIMS Training database and
- STEPIMS Production (live) database.

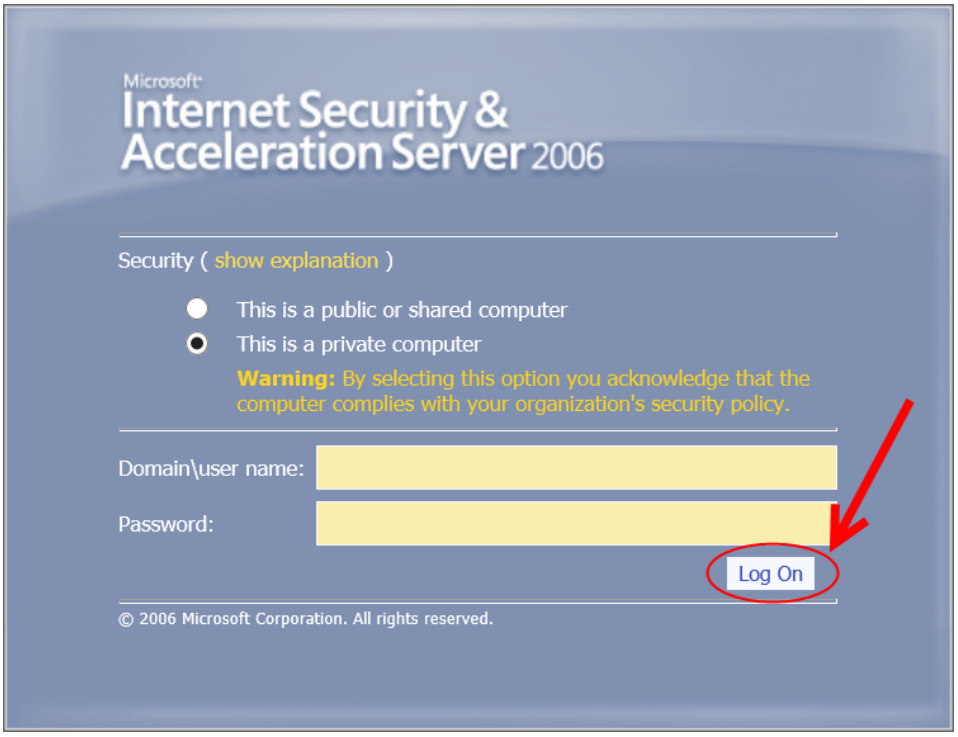
TRAINING AND PRODUCTION DATABASES

STEPIMS TRAINING is only for training and demonstration purposes. Do not enter real client details in this system. The link to STEPIMS TRAINING is: http://trainingstepims.housing.wa.gov.au

STEPIMS PRODUCTION is the live system used for actual cases. The link to STEPIMS PRODUCTION is: https://stepims.housing.wa.gov.au/default.aspx

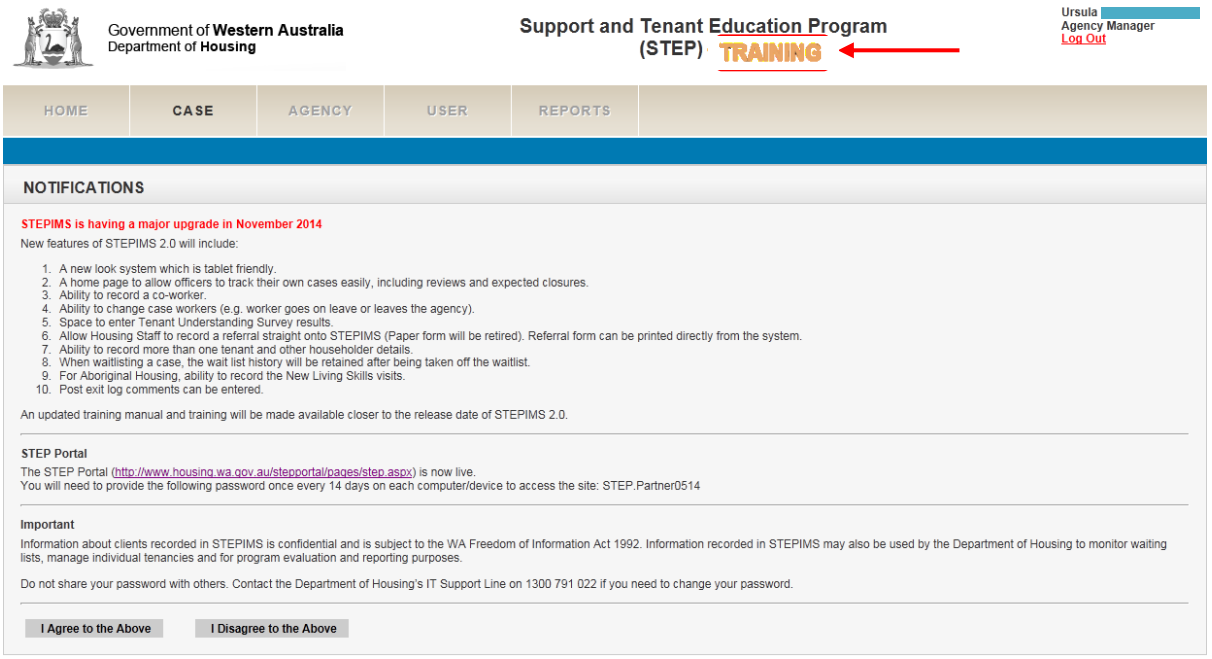
Log On Screen

When you access either of these databases in your web browser, the following screen will be displayed:


Microsoft
Internet Security & Acceleration Server 2006
Security (show explanation)
This is a public or shared computer
This is a private computer
Warning: By selecting this option you acknowledge that the computer complies with your organization's security policy.
Domain\user name:
Password:
Log On
© 2006 Microsoft Corporation. All rights reserved.

Enter your username and password and click the Log On button. You will then be taken to the Notifications screen.

Notifications Screen


Government of Western Australia
Department of Housing
Support and Tenant Education Program
(STEP) TRAINING
Ursula
Agency Manager
Log Out
HOME
CASE
AGENCY
USER
REPORTS
NOTIFICATIONS
STEPIMS is having a major upgrade in November 2014
New features of STEPIMS 2.0 will include:
1. A new look system which is tablet friendly.
2. A home page to allow officers to track their own cases easily, including reviews and expected closures.
3. Ability to record a co-worker.
4. Ability to change case workers (e.g. worker goes on leave or leaves the agency).
5. Space to enter Tenant Understanding Survey results.
6. Allow Housing Staff to record a referral straight onto STEPIMS (Paper form will be retired). Referral form can be printed directly from the system.
7. Ability to record more than one tenant and other householder details.
8. When waitlisting a case, the wait list history will be retained after being taken off the waitlist.
9. For Aboriginal Housing, ability to record the New Living Skills visits.
10. Post exit log comments can be entered.
An updated training manual and training will be made available closer to the release date of STEPIMS 2.0.
STEP Portal
The STEP Portal (http://www.housing.wa.gov.au/stepportal/pages/step.aspx) is now live.
You will need to provide the following password once every 14 days on each computer/device to access the site: STEP.Partner0514
Important
Information about clients recorded in STEPIMS is confidential and is subject to the WA Freedom of Information Act 1992. Information recorded in STEPIMS may also be used by the Department of Housing to monitor waiting lists, manage individual tenancies and for program evaluation and reporting purposes.
Do not share your password with others. Contact the Department of Housing's IT Support Line on 1300 791 022 if you need to change your password.
I Agree to the Above
I Disagree to the Above

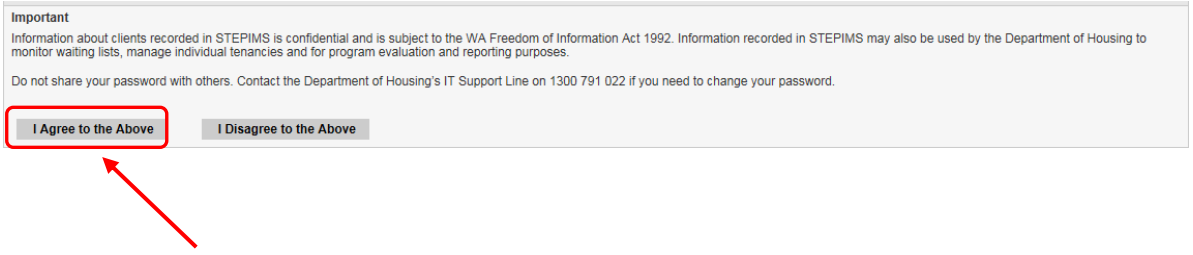
Important *– You can confirm you are in the right database by checking that the word "TRAINING" is displayed in the banner.*

The Notifications screen contains information about upcoming system maintenance and an acknowledgement and reminder screen about client confidentiality and password security.

The acknowledgement and reminder message:

> *Important*
>
> *Information about clients recorded in STEPIMS is confidential, but is subject to the WA Freedom of Information Act 1992. Information recorded in STEPIMS may also be used by the Department of Housing to monitor waiting lists, manage individual tenancies and for program evaluation and reporting purposes.*
>
> *Do not share your password with others. Contact the Department of Housing's IT Support Line on 1300 791 022 if you need to change your password.*

Click on the '*I Agree to the Above'* button to proceed to the *Home* page:


Important
Information about clients recorded in STEPIMS is confidential and is subject to the WA Freedom of Information Act 1992. Information recorded in STEPIMS may also be used by the Department of Housing to monitor waiting lists, manage individual tenancies and for program evaluation and reporting purposes.
Do not share your password with others. Contact the Department of Housing's IT Support Line on 1300 791 022 if you need to change your password.
I Agree to the Above
I Disagree to the Above

HOME PAGE

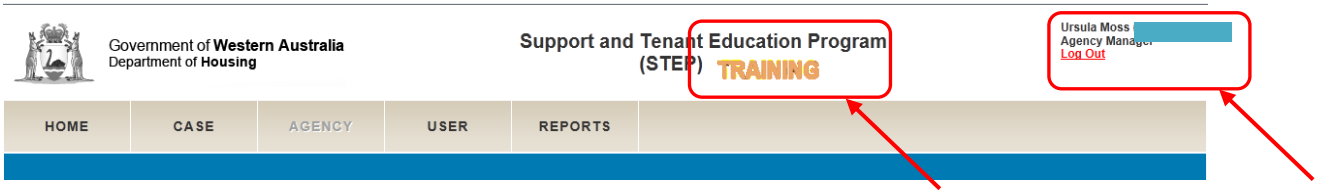
The *Home* page display will vary depending on the level of user access and the availability of some menu options that may be restricted. Details of the various *Home p*age displays will be provided when explaining each user access level.

General Information that is displayed on all *Home* pages is explained below:

Display Information – Agency, Database and User Details
The middle area at the top of the screen indicates that you are in the TRAINING database. Please note there is no label displayed in the PRODUCTION database.

The top right area of the screen shows:

- Your Log On ID
- Your name
- Your access level
- A Log Out button



General Navigation
In the top grey banner of the screen, the Menu options display. You can view/edit/add new cases depending on the access level that has been set up for you. If you do not have access to a functionality it will be "greyed out".

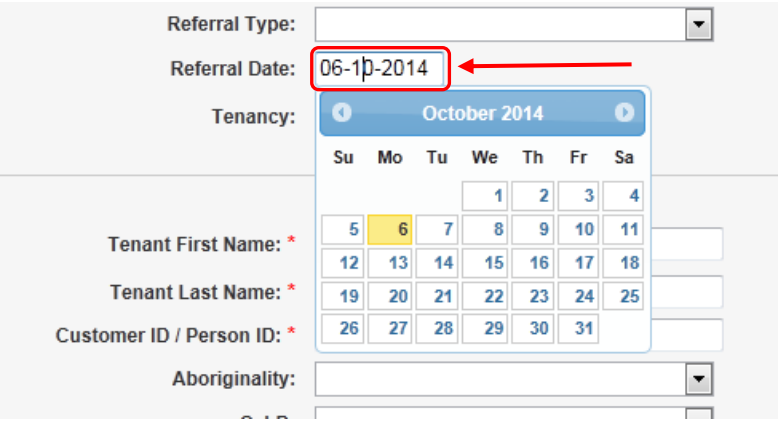
The options are:

Menu Option	Details
Home	Displays summary information about cases in the system.
Case	There are two options. **Case - Search** allows the user to search for cases. A range of search criteria can be used i.e., case status, cases managed by a specific case worker etc. From the search results, the user can view details of a case and update records (e.g. record home visits, review meetings etc.).
	Case – Add New is available to users with Housing Officer and Housing Manager access.
Agency	Available to users with Administrator access and Housing ICT access.
User	Available to users with the following access: • Administrator • Housing ICT • Housing Manager • Agency Manager Enables the above users to edit details and disable user accounts.
Reports	Available to users with Agency Manager or Housing Manager access. Allows the Manager to run various reports.

Mandatory Fields
Fields marked with a red asterisk * are mandatory fields that must be completed before you can save a record.

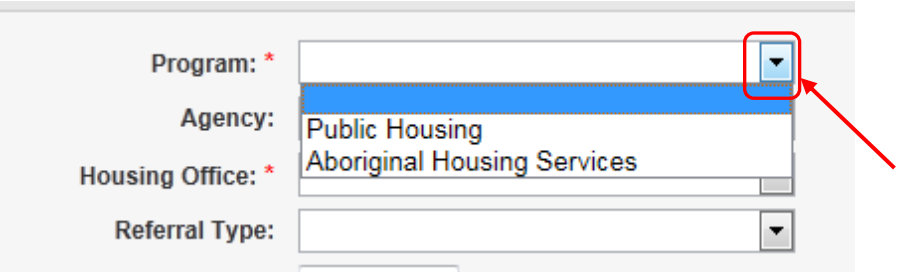
Date Fields

Date fields (such as the Referral Date) can be completed either by typing in the date such as 21-10-2014 (DD-MM-YYYY format) or you can click in the field to display a calendar to choose the date.



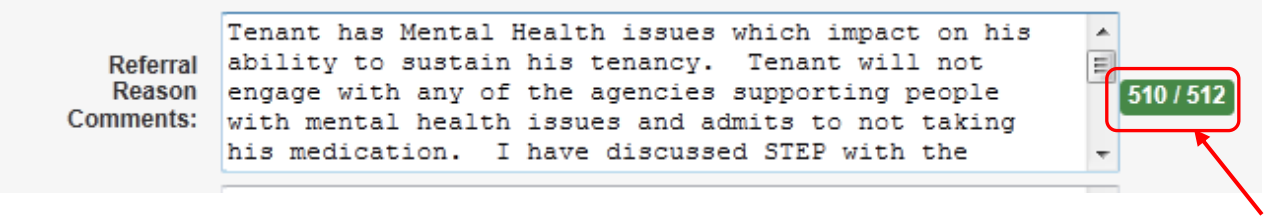
Drop Down Lists

Fields ending in this symbol provide a drop down list of options. Fields without the drop down symbol are mostly free text or date fields.



Large Text Fields

Large text fields display the number of characters used and available to the right or underneath each field and will update as you type.


Referral Reason Comments:
Tenant has Mental Health issues which impact on his ability to sustain his tenancy. Tenant will not engage with any of the agencies supporting people with mental health issues and admits to not taking his medication. I have discussed STEP with the
510 / 512

If you go over the character limit, the character count field turns from green to red. You will not be able to save until you reduce the number of characters to the stated limit or less.

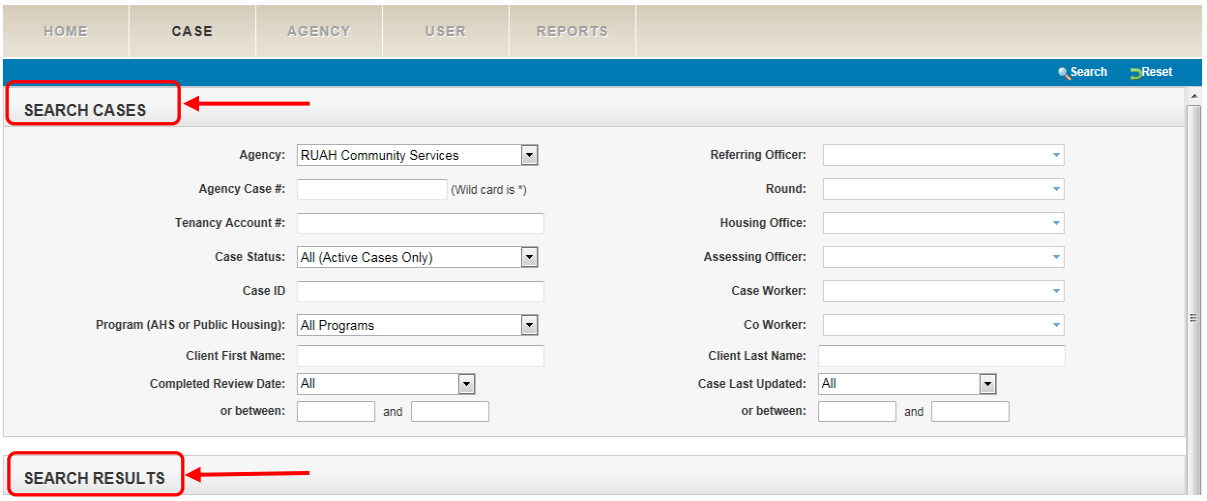
TO SEARCH FOR A CASE

Agency Case Enquiry users have read only access with no ability to update records. This is designed for STEP Provider Administration and/or Reception staff.

CASE - Menu Option

For users with Agency Case Enquiry access the *Home* page displays the following:

Home Page



Case – Search

This option allows you to search for cases. You can go directly from the *Search Results* area into the client details screen.

To search, you can enter details in a number of fields and make selections from the drop-down options.

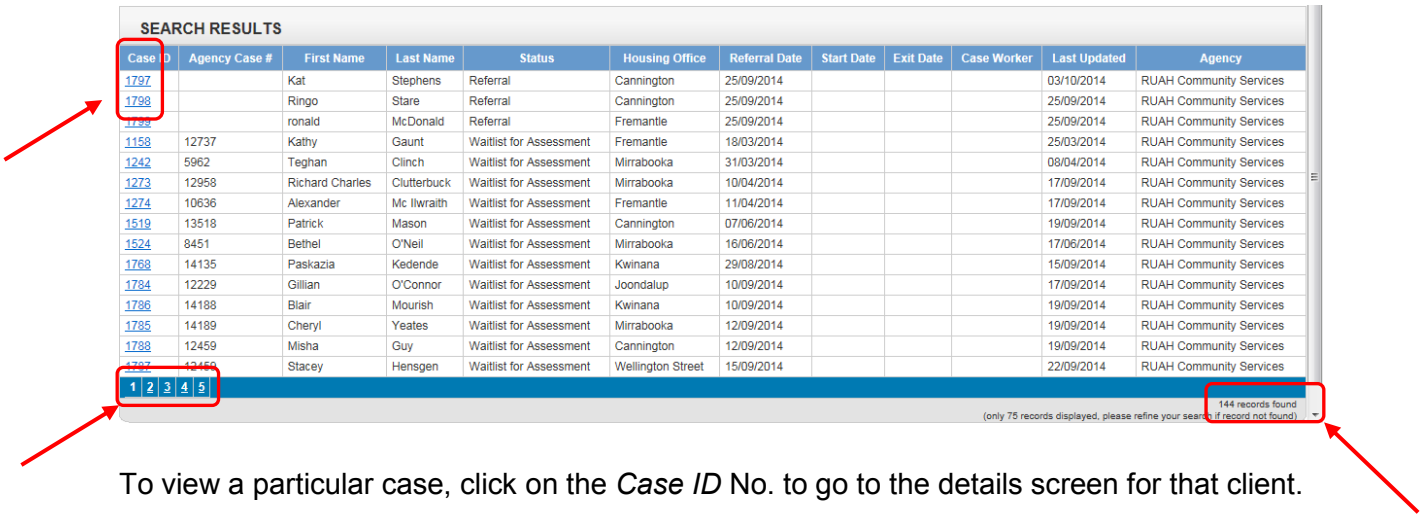
Search criteria may be entered in the following fields:

- *Agency Case #*
- *Tenancy Account #*
- *Case ID*
- *Client First Name*
- *Client Last Name*

Search criteria may be selected from the following drop-down options:

- *Agency*: this field automatically defaults to your agency
- *Case Status*:
    - *All (Active Case Only)*
    - *All (Include Closed/Withdrawn Cases)*
    - *Referral*
    - *Ended at Referral Stage*
    - *Waitlist for Assessment*
    - *Under Assessment*
    - *Ended at Assessment Stage*
    - *Waitlisted*
    - *Case Open*
    - *Case Terminated Early*
    - *Case Closed*
- *Program (AHS or Public Housing)*
    - *All Programs*
    - *Public Housing*
    - *Aboriginal Housing Services*
- *Complete Review Date:*
    - *All*
    - *In Last 10 Days*
    - *In Last 30 Days*
    - *Custom* - select a date range
- *Referring Officer* – Choose from List of Names of Housing Officers or the option to check all officers is available
- *Round* – Choose from a list of Housing Office Round Numbers (A Round is a group of houses covered by a Housing Services Officer)
- *Housing Office* – Choose from a List of Housing Offices or the option to check all offices is available
- *Assessing Officer* - Choose from List of Assessing Officers or the option to check all officers is available
- *Case Worker* - Choose from List of Case Workers or the option to check all officers is available
- *Co Worker* – Choose from List of Co Workers or the option to check all officers is available
- *Case Last Updated*
    - *All*
    - *In Last 10 Days*
    - *In Last 30 Days*
    - *Custom* - select a date range

A search may be narrowed by completing as much of the Search Criteria as possible. The results are displayed in the *Search Results* section and are listed in *Status* order (i.e. Referral; Waitlist for Assessment etc).



SEARCH RESULTS

Case ID	Agency Case #	First Name	Last Name	Status	Housing Office	Referral Date	Start Date	Exit Date	Case Worker	Last Updated	Agency
1797		Kat	Stephens	Referral	Cannington	25/09/2014				03/10/2014	RUAH Community Services
1798		Ringo	Stare	Referral	Cannington	25/09/2014				25/09/2014	RUAH Community Services
1799		ronald	McDonald	Referral	Fremantle	25/09/2014				25/09/2014	RUAH Community Services
1158	12737	Kathy	Gaunt	Waitlist for Assessment	Fremantle	18/03/2014				25/03/2014	RUAH Community Services
1242	5962	Teghan	Clinch	Waitlist for Assessment	Mirrabooka	31/03/2014				08/04/2014	RUAH Community Services
1273	12958	Richard Charles	Clutterbuck	Waitlist for Assessment	Mirrabooka	10/04/2014				17/09/2014	RUAH Community Services
1274	10636	Alexander	Mc Ilwraith	Waitlist for Assessment	Fremantle	11/04/2014				17/09/2014	RUAH Community Services
1519	13518	Patrick	Mason	Waitlist for Assessment	Cannington	07/06/2014				19/09/2014	RUAH Community Services
1524	8451	Bethel	O'Neil	Waitlist for Assessment	Mirrabooka	16/06/2014				17/06/2014	RUAH Community Services
1768	14135	Paskazia	Kedende	Waitlist for Assessment	Kwinana	29/08/2014				15/09/2014	RUAH Community Services
1784	12229	Gillian	O'Connor	Waitlist for Assessment	Joondalup	10/09/2014				17/09/2014	RUAH Community Services
1786	14188	Blair	Mourish	Waitlist for Assessment	Kwinana	10/09/2014				19/09/2014	RUAH Community Services
1785	14189	Cheryl	Yeates	Waitlist for Assessment	Mirrabooka	12/09/2014				19/09/2014	RUAH Community Services
1788	12459	Misha	Guy	Waitlist for Assessment	Cannington	12/09/2014				19/09/2014	RUAH Community Services
1787	13459	Stacey	Hensgen	Waitlist for Assessment	Wellington Street	15/09/2014				22/09/2014	RUAH Community Services

1 2 3 4 5

144 records found
(only 75 records displayed, please refine your search if record not found)

To view a particular case, click on the *Case ID* No. to go to the details screen for that client.

Information on the *Case Details* screen is covered in a later section of this guide.

The number(s) in the bottom left corner of the screen (in the blue banner) indicates the number of pages found; 15 records per page are displayed at a time. The number in the bottom right corner of the screen (in the grey banner) shows the total number of cases that met the search criteria.

Hint: The *Reset* button removes any existing search criteria so you can start again.

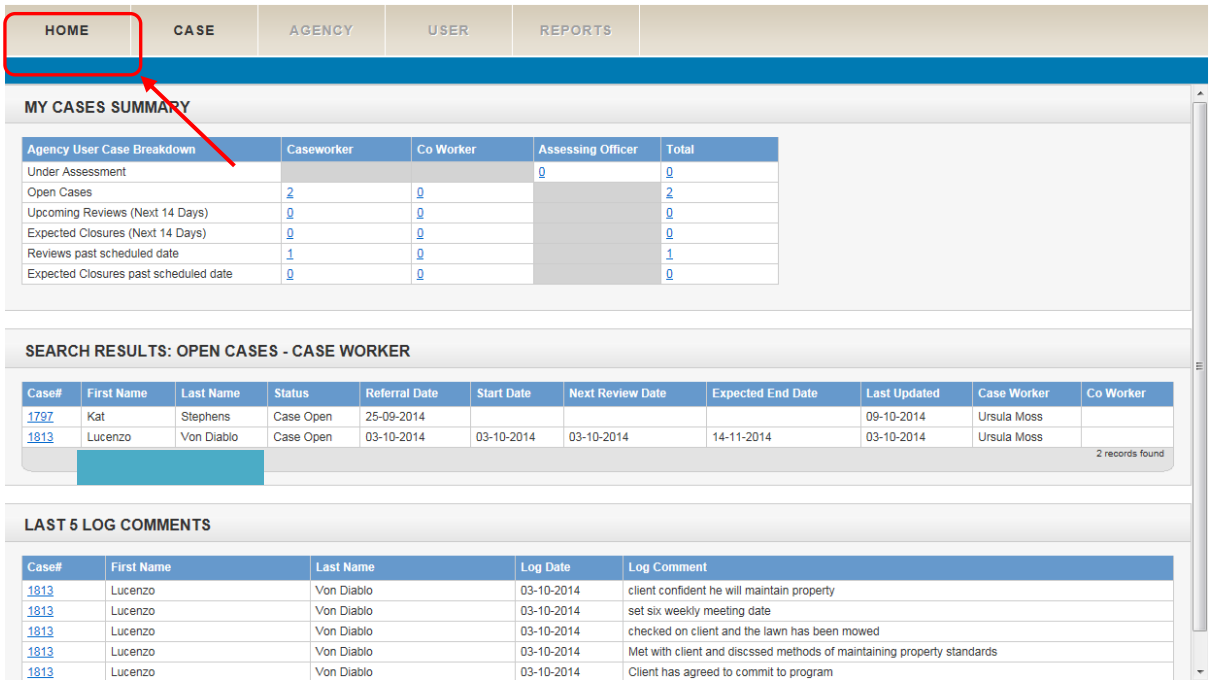
Note: By default, inactive cases (clients who have exited the program and referrals that were withdrawn/not accepted) do not display in the *Search Results* unless the "*All (Include Closed/Withdrawn Cases)"* is selected from the *Case Status* drop-down option.

TO EDIT AND UPDATE A CASE

Users with *Agency Case Officer* access can search edit and update client records.

HOME - Menu Option

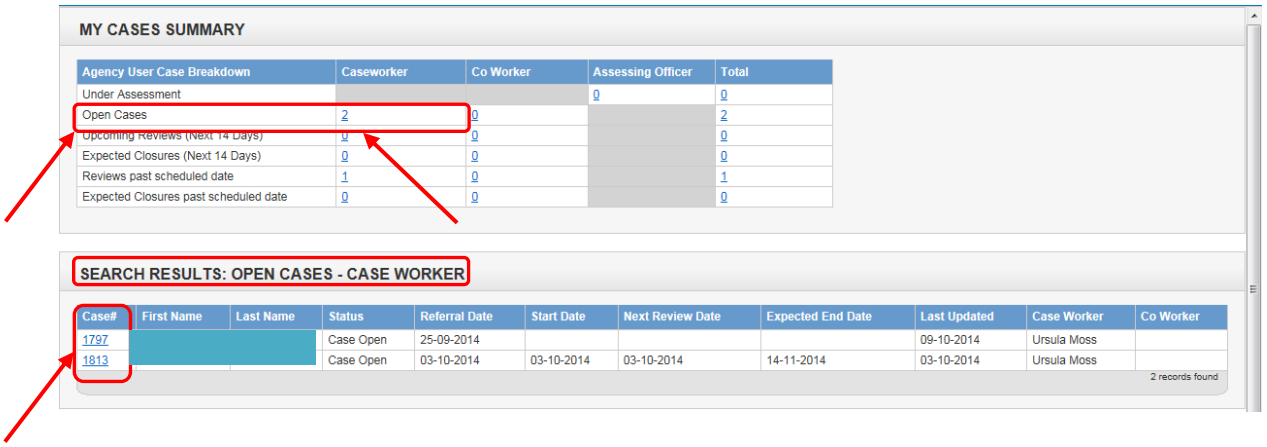
For users with Agency Case Officer access the *Home* page displays the following:


HOME
CASE
AGENCY
USER
REPORTS
MY CASES SUMMARY
Agency User Case Breakdown | Caseworker | Co Worker | Assessing Officer | Total
Under Assessment | | | 0 | 0
Open Cases | 2 | 0 | | 2
Upcoming Reviews (Next 14 Days) | 0 | 0 | | 0
Expected Closures (Next 14 Days) | 0 | 0 | | 0
Reviews past scheduled date | 1 | 0 | | 1
Expected Closures past scheduled date | 0 | 0 | | 0
SEARCH RESULTS: OPEN CASES - CASE WORKER
Case# | First Name | Last Name | Status | Referral Date | Start Date | Next Review Date | Expected End Date | Last Updated | Case Worker | Co Worker
1797 | Kat | Stephens | Case Open | 25-09-2014 | | | | 09-10-2014 | Ursula Moss |
1813 | Lucenzo | Von Diablo | Case Open | 03-10-2014 | 03-10-2014 | 03-10-2014 | 14-11-2014 | 03-10-2014 | Ursula Moss |
2 records found
LAST 5 LOG COMMENTS
Case# | First Name | Last Name | Log Date | Log Comment
1813 | Lucenzo | Von Diablo | 03-10-2014 | client confident he will maintain property
1813 | Lucenzo | Von Diablo | 03-10-2014 | set six weekly meeting date
1813 | Lucenzo | Von Diablo | 03-10-2014 | checked on client and the lawn has been mowed
1813 | Lucenzo | Von Diablo | 03-10-2014 | Met with client and discssed methods of maintaining property standards
1813 | Lucenzo | Von Diablo | 03-10-2014 | Client has agreed to commit to program

The *Home* menu option displays information about cases in the system for individual case workers.

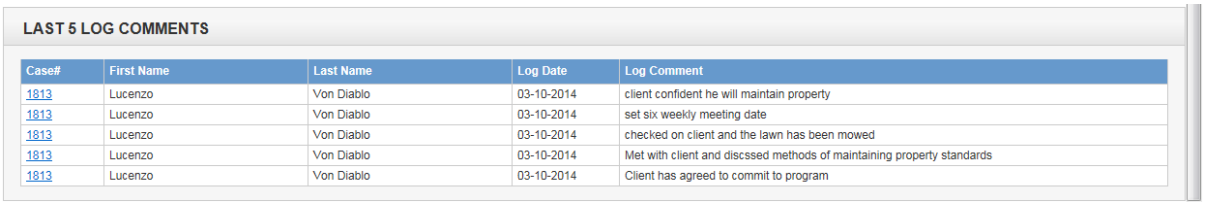
My Cases Summary

In the *My Cases Summary* section, the cases displayed pertain to the individual case worker. To view *Open Cases*, click on the number under one of the headings (e.g. *Caseworker; Co Worker; Assessing Officer* or *Total*). The results are displayed in the *Search Results* area.


MY CASES SUMMARY
Agency User Case Breakdown | Caseworker | Co Worker | Assessing Officer | Total
Under Assessment | | | 0 | 0
Open Cases | 2 | 0 | | 2
Upcoming Reviews (Next 14 Days) | 0 | 0 | | 0
Expected Closures (Next 14 Days) | 0 | 0 | | 0
Reviews past scheduled date | 1 | 0 | | 1
Expected Closures past scheduled date | 0 | 0 | | 0
SEARCH RESULTS: OPEN CASES - CASE WORKER
Case# | First Name | Last Name | Status | Referral Date | Start Date | Next Review Date | Expected End Date | Last Updated | Case Worker | Co Worker
1797 | | | Case Open | 25-09-2014 | | | | 09-10-2014 | Ursula Moss |
1813 | | | Case Open | 03-10-2014 | 03-10-2014 | 03-10-2014 | 14-11-2014 | 03-10-2014 | Ursula Moss |
2 records found

Last 5 Log Comments

The Last 5 log comments made to cases are displayed in this area.

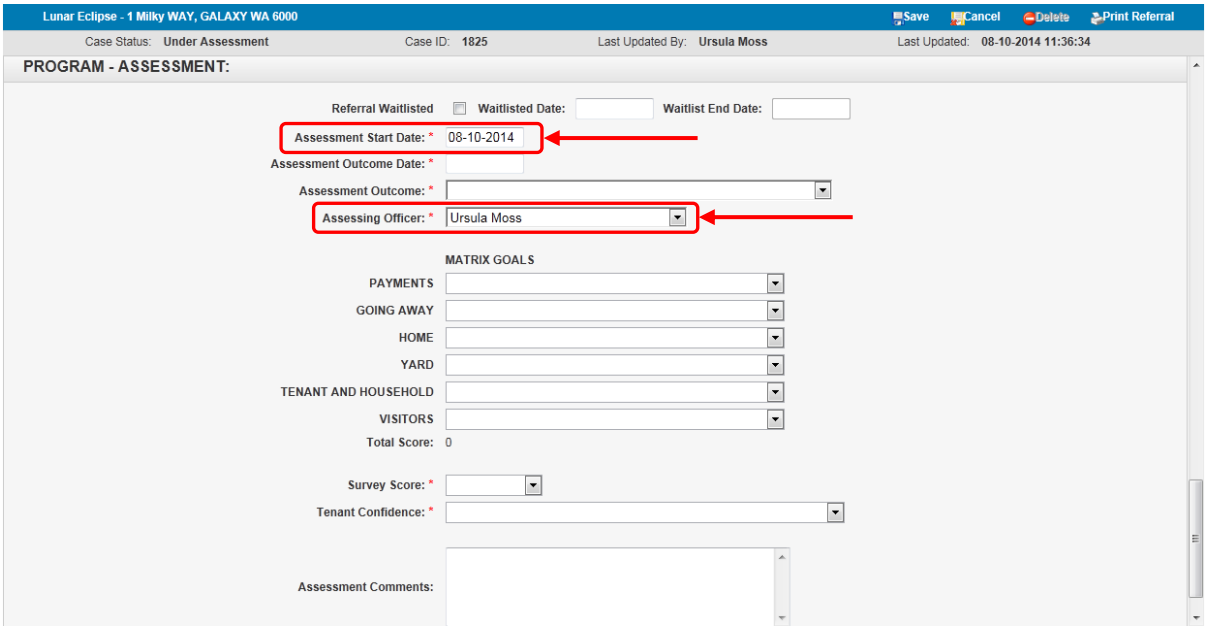

LAST 5 LOG COMMENTS
Case# First Name Last Name Log Date Log Comment
1813 Lucenzo Von Diablo 03-10-2014 client confident he will maintain property
1813 Lucenzo Von Diablo 03-10-2014 set six weekly meeting date
1813 Lucenzo Von Diablo 03-10-2014 checked on client and the lawn has been mowed
1813 Lucenzo Von Diablo 03-10-2014 Met with client and discssed methods of maintaining property standards
1813 Lucenzo Von Diablo 03-10-2014 Client has agreed to commit to program

Program - Assessment

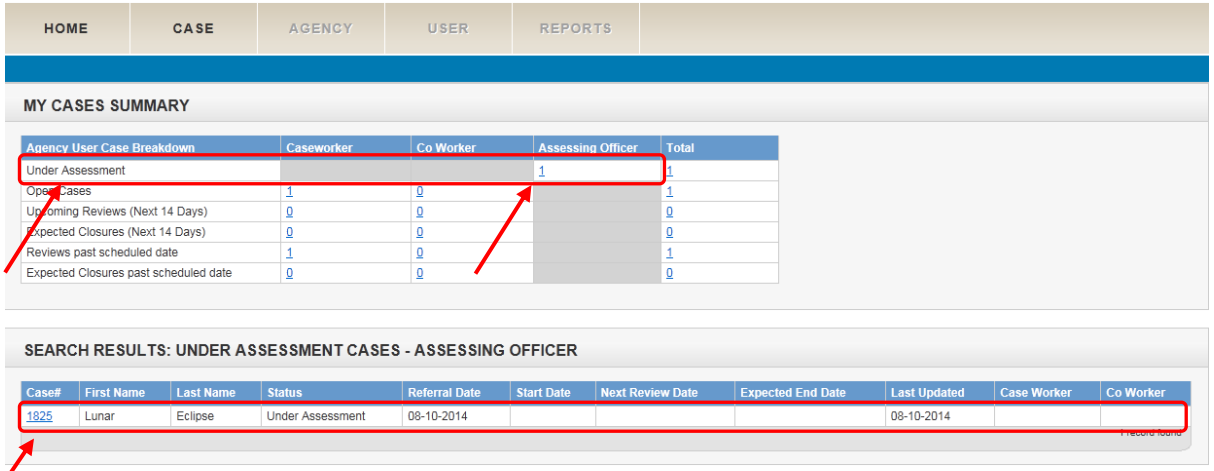
When a Referral Outcome is entered and an assessment is to take place, the *'Program – Assessment'* section will appear.

An *Agency Manager* can allocate an *Assessing Officer*. The *Agency Manager* will need to complete the *Assessment Start Date* and the *Assessing Officer*.

Note: Users with *Agency Case Worker* access in STEPIMS can also complete these details.



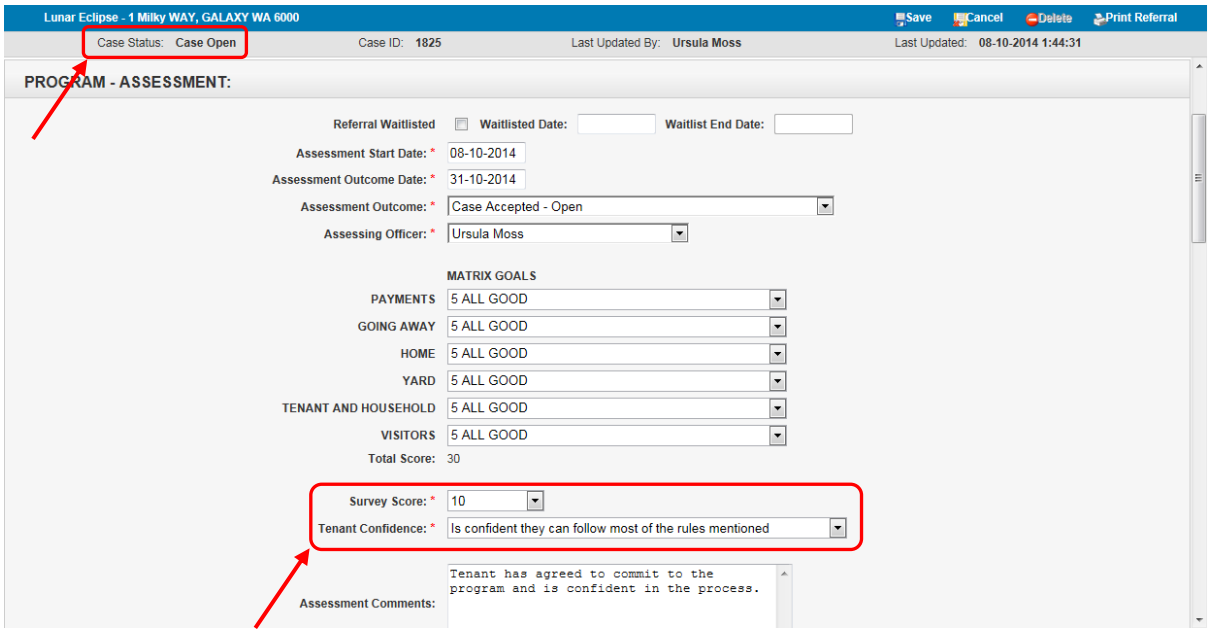
The referral will now appear in the Assessing Officer's Home page under the *My Cases Summary – Agency User Case Breakdown.* To view the referral, click on the number in the Assessing Officer column. The referral will display in the *Search Results: Under Assessment Cases – Assessing Officer.*



Click on the Case # to open the "case". The Agency Case Worker can now record details in the *Program Assessment* area along with any comments in the *Assessment Comments* field.

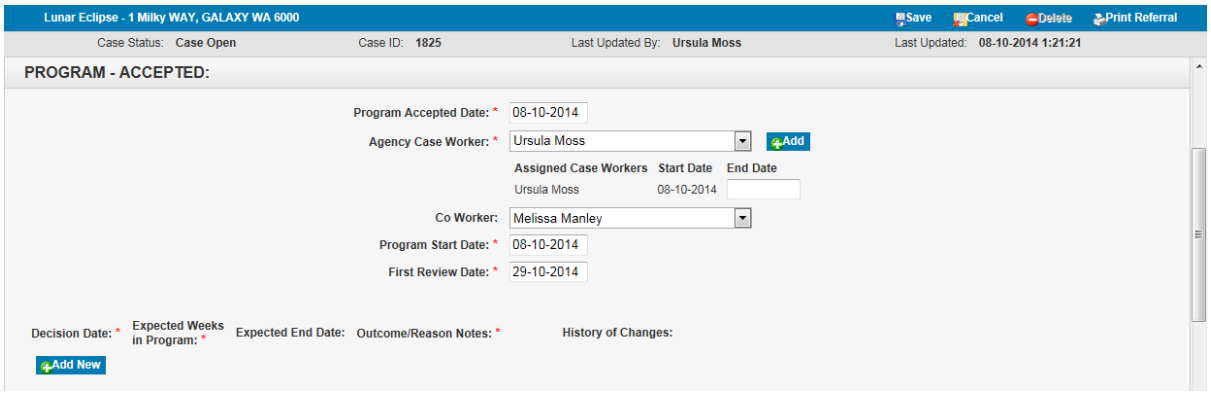
Survey Score and Tenant Confidence

The *Tenant Understanding Survey* is used to measure the tenant's understanding and confidence in meeting their tenancy obligations. STEP Providers conduct the survey at the initial/assessment meeting (entry) and the final meeting (exit).


Lunar Eclipse - 1 Milky WAY, GALAXY WA 6000
Save
Cancel
Delete
Print Referral
Case Status: Case Open
Case ID: 1825
Last Updated By: Ursula Moss
Last Updated: 08-10-2014 1:44:31
PROGRAM - ASSESSMENT:
Referral Waitlisted
Waitlisted Date:
Waitlist End Date:
Assessment Start Date: * 08-10-2014
Assessment Outcome Date: * 31-10-2014
Assessment Outcome: * Case Accepted - Open
Assessing Officer: * Ursula Moss
MATRIX GOALS
PAYMENTS 5 ALL GOOD
GOING AWAY 5 ALL GOOD
HOME 5 ALL GOOD
YARD 5 ALL GOOD
TENANT AND HOUSEHOLD 5 ALL GOOD
VISITORS 5 ALL GOOD
Total Score: 30
Survey Score: * 10
Tenant Confidence: * Is confident they can follow most of the rules mentioned
Assessment Comments:
Tenant has agreed to commit to the program and is confident in the process.

Matrix Goals are recorded and when the case is saved, the *Case Status* will change to *Case Open* and the *Program – Accepted* screen will appear.

Program - Accepted

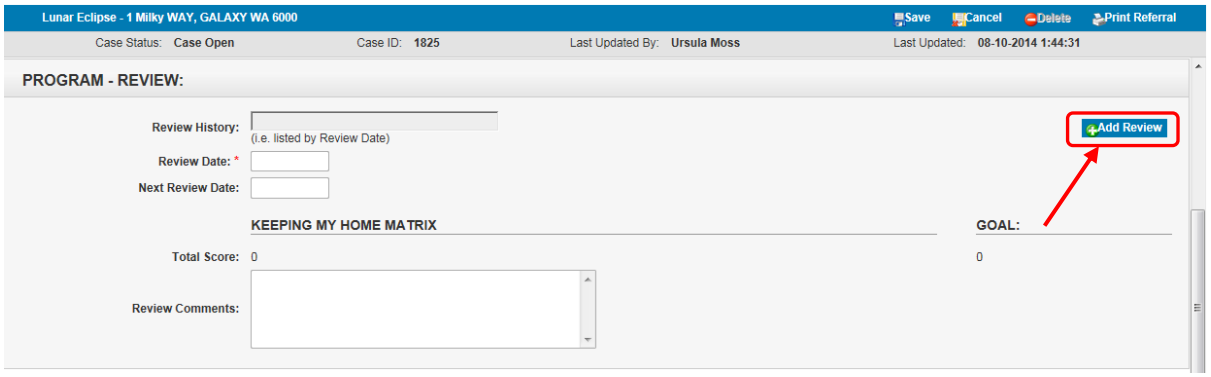


The following are definitions for the fields that need to be completed:

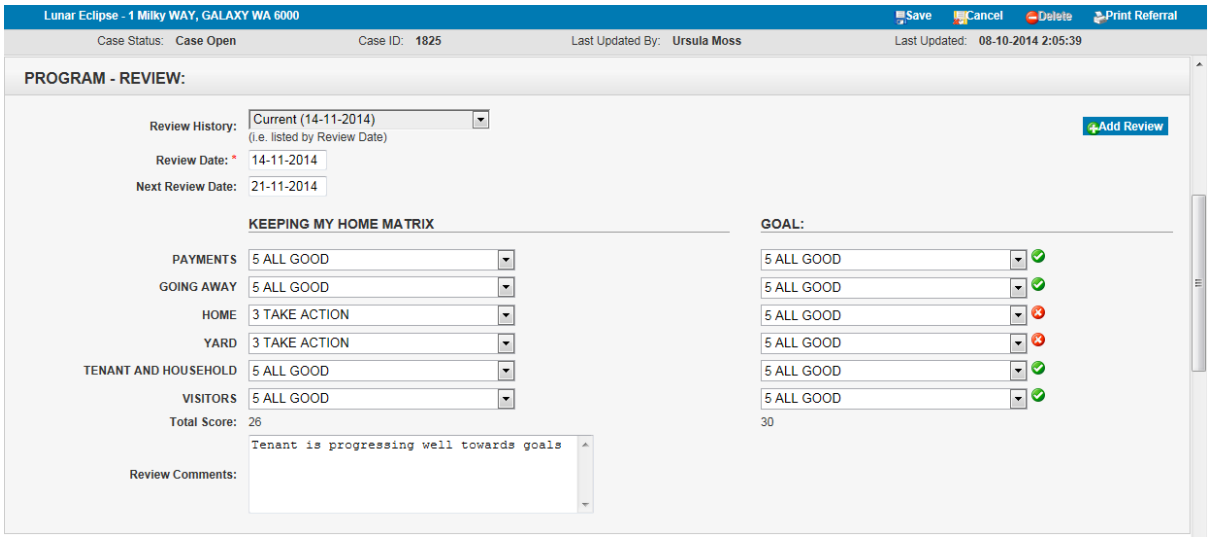
Field	Details
Program Accepted Date	Date client is accepted onto STEP
Agency Case Worker	Name of the Case Worker working with the client.
Co Worker	To be completed if an additional Case Worker assigned to the case (e.g. if the original Case Worker is handing over the case prior to going on leave)
Program Start Date	Date client commences on STEP. This is usually the same day as the 'Program Accepted Date'.
First Review Date	Date when the Action Plan (and Matrix) will be formally reviewed with the client. Suggested timeframe is six weeks.
Expected Weeks in Program	Approximate number of weeks the client is expected to be on the program.

Program – Review

This section captures the progress of the tenant at key times while they are on the program. For a new case, the section will initially be blank.



Click on Add Review to commence recording the outcome of the review. The original Matrix scores and goals will appear:


Lunar Eclipse - 1 Milky WAY, GALAXY WA 6000
Save
Cancel
Delete
Print Referral
Case Status: Case Open
Case ID: 1825
Last Updated By: Ursula Moss
Last Updated: 08-10-2014 2:05:39
PROGRAM - REVIEW:
Review History: Current (14-11-2014)
(i.e. listed by Review Date)
Add Review
Review Date: * 14-11-2014
Next Review Date: 21-11-2014
KEEPING MY HOME MATRIX
GOAL:
PAYMENTS 5 ALL GOOD 5 ALL GOOD
GOING AWAY 5 ALL GOOD 5 ALL GOOD
HOME 3 TAKE ACTION 5 ALL GOOD
YARD 3 TAKE ACTION 5 ALL GOOD
TENANT AND HOUSEHOLD 5 ALL GOOD 5 ALL GOOD
VISITORS 5 ALL GOOD 5 ALL GOOD
Total Score: 26
30
Tenant is progressing well towards goals
Review Comments:

Definitions:

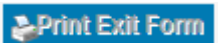
Field	Details
Review History	Used to view information on previous reviews.
Review Date	Date the Matrix review is meant to take place.
Next Review Date	Date the Matrix will be reviewed again with the tenant (e.g. in six weeks).
Keeping My Home Matrix	The last Matrix scores that were entered.
Goals	The previously set goals are displayed but can be adjusted. Goals that have been met will have a green tick next to them. Goals that have not been met will have a red cross next to them.
Total Score	The Matrix score and Target Goal scores.
Review Comments	Free text field to record any additional information.

When it is time to review the case again, click on

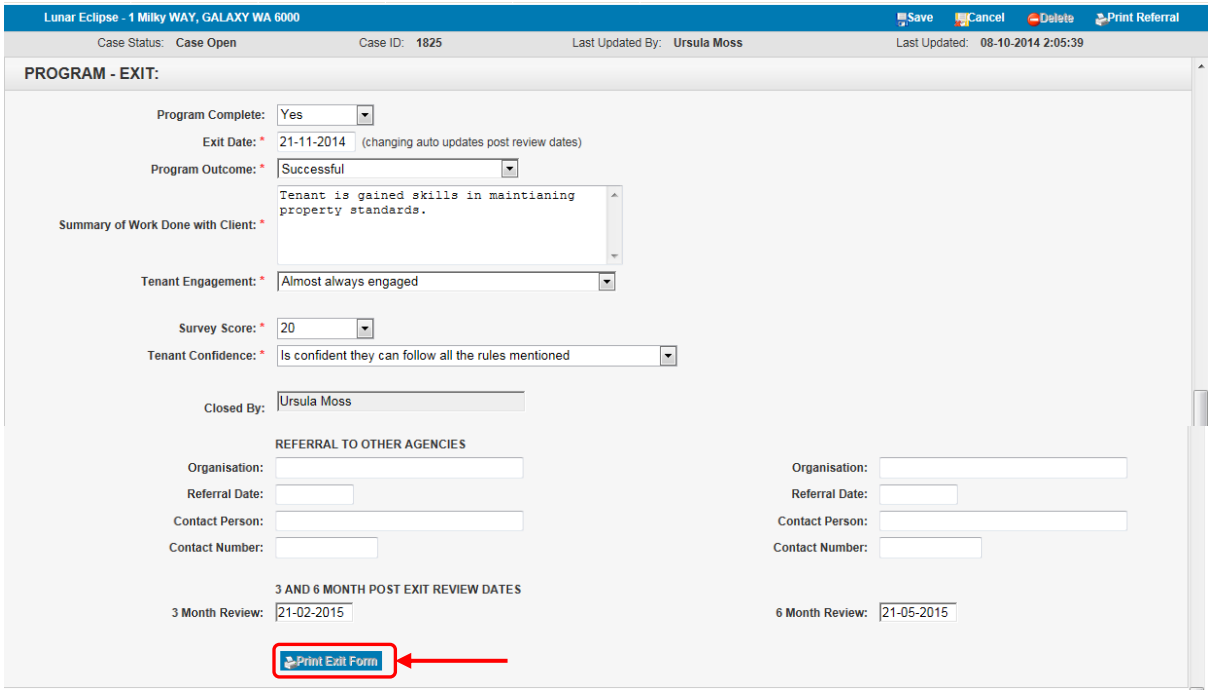
to enter data.

Program – Exit
Clients may exit the program at any time and for various reasons. Not all of them may complete the program.

If the client is referred to other agencies these details can be recorded in this area.

To print the *Exit Form* click on the 

button.


Lunar Eclipse - 1 Milky WAY, GALAXY WA 6000
Save
Cancel
Delete
Print Referral
Case Status: Case Open
Case ID: 1825
Last Updated By: Ursula Moss
Last Updated: 08-10-2014 2:05:39
PROGRAM - EXIT:
Program Complete: Yes
Exit Date: * 21-11-2014 (changing auto updates post review dates)
Program Outcome: * Successful
Summary of Work Done with Client: * Tenant is gained skills in maintianing property standards.
Tenant Engagement: * Almost always engaged
Survey Score: * 20
Tenant Confidence: * Is confident they can follow all the rules mentioned
Closed By: Ursula Moss
REFERRAL TO OTHER AGENCIES
Organisation:
Referral Date:
Contact Person:
Contact Number:
Organisation:
Referral Date:
Contact Person:
Contact Number:
3 AND 6 MONTH POST EXIT REVIEW DATES
3 Month Review: 21-02-2015
6 Month Review: 21-05-2015
Print Exit Form

Survey Score and Tenant Confidence

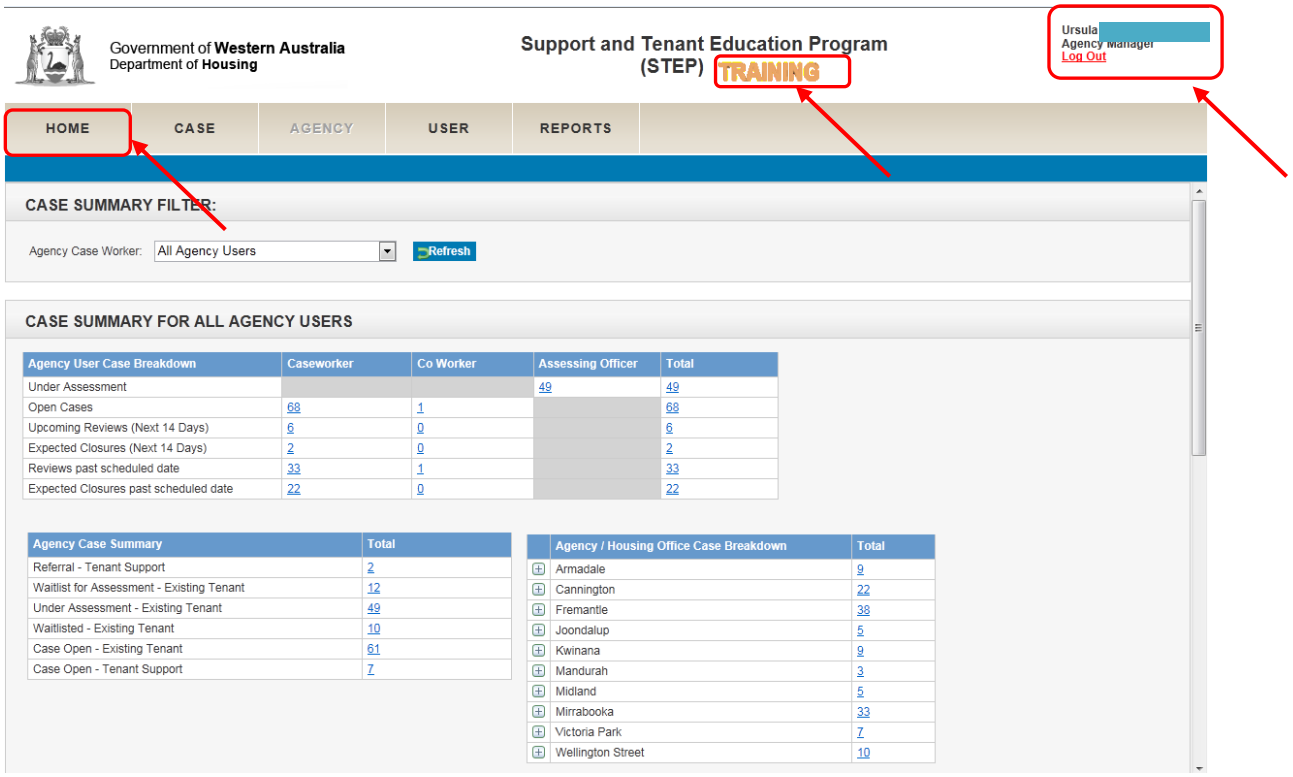
The *Tenant Understanding Survey* is used to measure the tenant's understanding and confidence in meeting their tenancy obligations. STEP Providers conduct the survey at the initial/assessment meeting (entry) and the final meeting (exit).

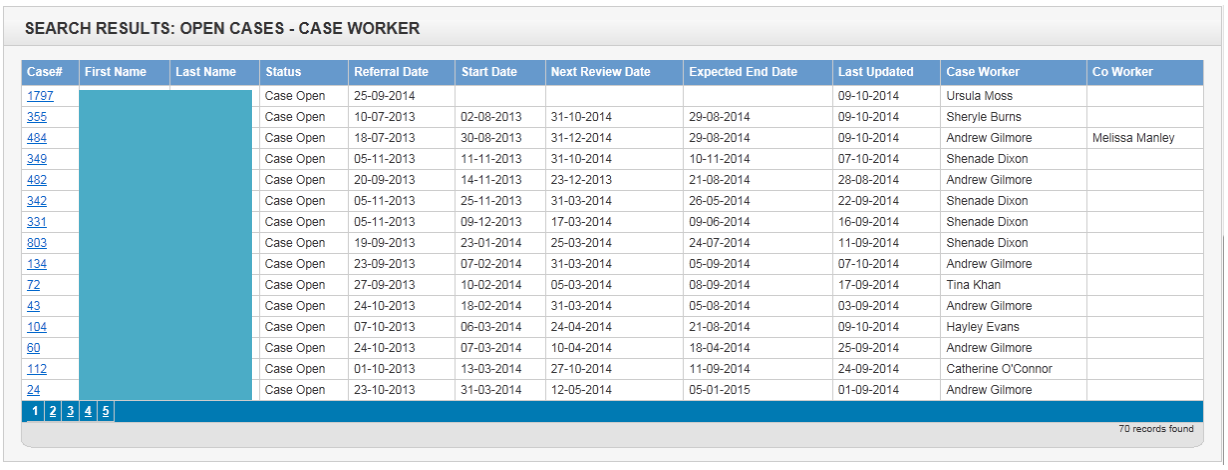
AGENCY MANAGER

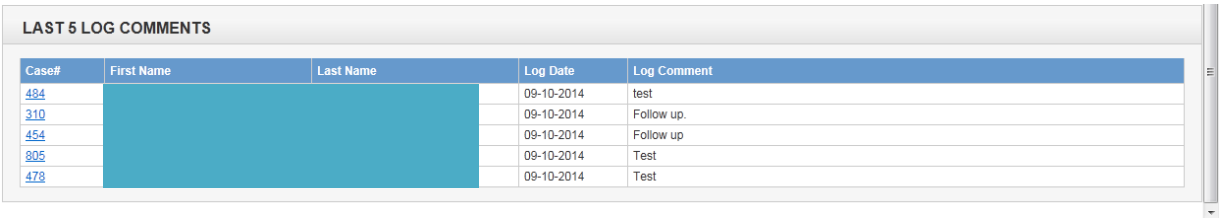
Users with *Agency Manager* access can search, edit, update client records and in addition the ability to access reports, edit user details and end user access. They can also delete log comments and expected end dates.

HOME - Menu Option

For users with *Agency Manager* access the *Home* page displays the following:


Government of Western Australia
Department of Housing
Support and Tenant Education Program
(STEP) TRAINING
Ursula
Agency Manager
Log Out
HOME
CASE
AGENCY
USER
REPORTS
CASE SUMMARY FILTER:
Agency Case Worker: All Agency Users
Refresh
CASE SUMMARY FOR ALL AGENCY USERS
Agency User Case Breakdown | Caseworker | Co Worker | Assessing Officer | Total
Under Assessment | | | 49 | 49
Open Cases | 68 | 1 | | 68
Upcoming Reviews (Next 14 Days) | 6 | 0 | | 6
Expected Closures (Next 14 Days) | 2 | 0 | | 2
Reviews past scheduled date | 33 | 1 | | 33
Expected Closures past scheduled date | 22 | 0 | | 22
Agency Case Summary | Total
Referral - Tenant Support | 2
Waitlist for Assessment - Existing Tenant | 12
Under Assessment - Existing Tenant | 49
Waitlisted - Existing Tenant | 10
Case Open - Existing Tenant | 61
Case Open - Tenant Support | 7
Agency / Housing Office Case Breakdown | Total
Armadale | 9
Cannington | 22
Fremantle | 38
Joondalup | 5
Kwinana | 9
Mandurah | 3
Midland | 5
Mirrabooka | 33
Victoria Park | 7
Wellington Street | 10

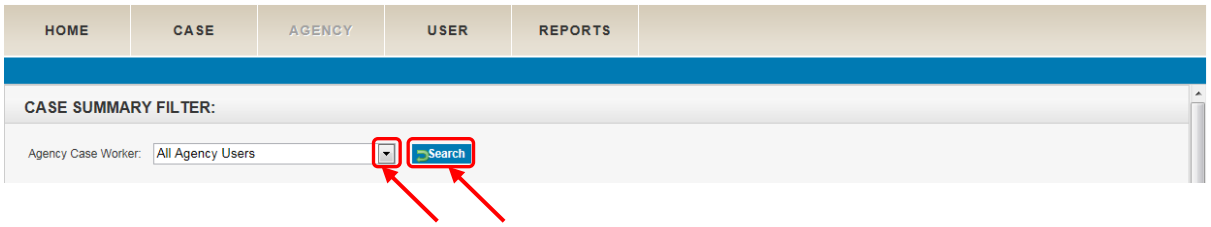




The *Home* menu option displays case summary information about cases in the system. The information displayed on the *Home* page is dependent on the level of access that the user is given.

Case Summary Filter

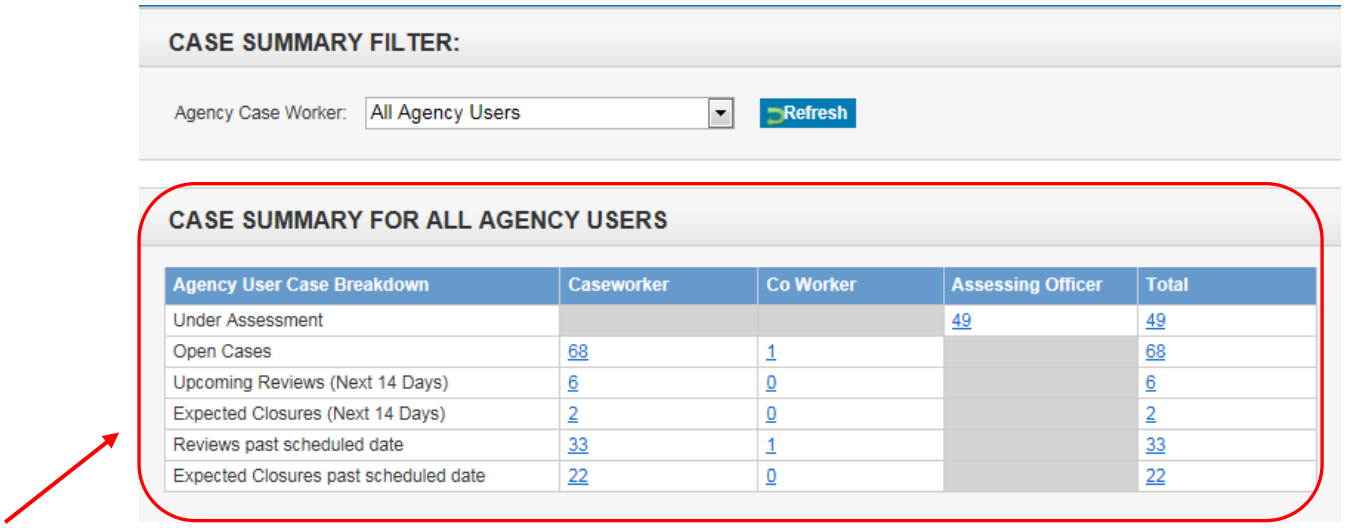
Users with *Agency Manger* access can view cases for All Agency Users or a particular Agency Case Officer. The *Agency Case Worker* drop-down list provides a list of all the Agency Users. To select a particular Case Officer click on the name.



The results are then displayed in the *Case Summary* section.

Case Summary For All Agency Users:

The Case Summary in the middle of the screen provides a breakdown of cases. STEPIMS Users with Agency Manager access will be able to view cases for all Agency Users.



The table below provides a brief description of the *Case breakdown* and the action required:

Agency User Case Breakdown	Description	Action
Under Assessment	Under Assessment cases assigned to the Caseworker.	Assessment needs to be completed and the outcome recorded on STEPIMS.
Open Cases	Open Cases assigned to the Caseworker/Co-worker.	Ongoing case management.
Upcoming reviews (Next 14 days)	Open Cases assigned to the Caseworker/Co-worker where the first or next review date is in the next 14 days.	Review to be completed and a Matrix Score entered. Schedule the next review date.
Expected closures (Next 14 days)	Open Cases assigned to the Caseworker/Co-worker where the expected end date is in the next 14 days.	Assess whether the case can be closed at the expected end date or add a new expected end date.
Reviews past scheduled date	Open Cases assigned to the Caseworker/Co-worker where the review is past the scheduled date.	Review to be completed and a Matrix Score entered. Schedule the next review date.
Expected closures past scheduled date	Open Cases assigned to the Caseworker/Co-worker where the expected end date has passed.	Assess whether the case can be closed or add a new expected end date.

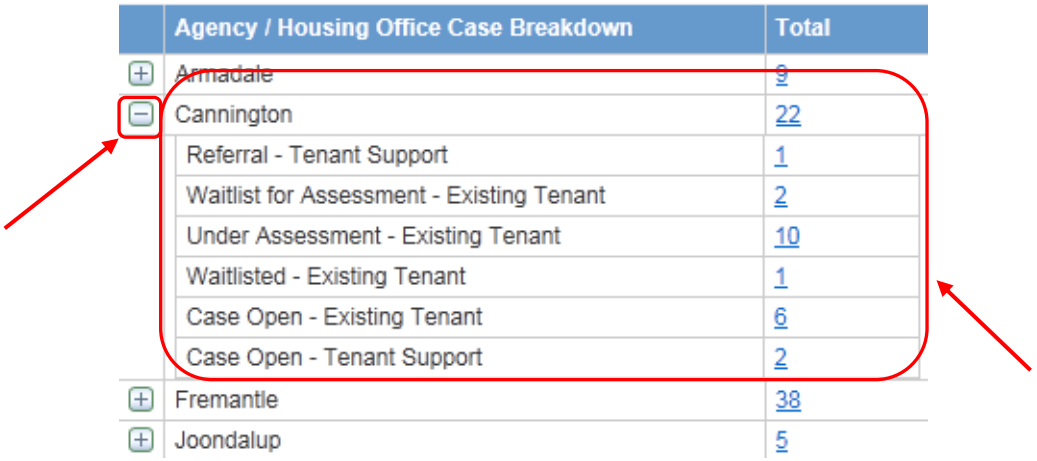
Agency Case Summary

The *Agency Case Summary* displays cases that have been assigned to Case Workers. New Referrals and Waitlisted cases will also display here.

Agency Case Summary	Total
Referral - Tenant Support	3
Referral - High / Intensive Tenant Support	1
Waitlist for Assessment - Existing Tenant	13
Waitlist for Assessment - Tenant Support	1
Under Assessment - Existing Tenant	48
Waitlisted - Existing Tenant	11
Waitlisted - Tenant Support	1
Case Open - Existing Tenant	58
Case Open - Tenant Support	13

Agency / Housing Office Case Breakdown

The *Agency/Housing Office Case Breakdown* displays the case status and referral type for all active cases for each Housing Office.



	Agency / Housing Office Case Breakdown	Total
⊞	Armadale	9
⊟	Cannington	22
	Referral - Tenant Support	1
	Waitlist for Assessment - Existing Tenant	2
	Under Assessment - Existing Tenant	10
	Waitlisted - Existing Tenant	1
	Case Open - Existing Tenant	6
	Case Open - Tenant Support	2
⊞	Fremantle	38
⊞	Joondalup	5

The table below provides a description of Case Types:

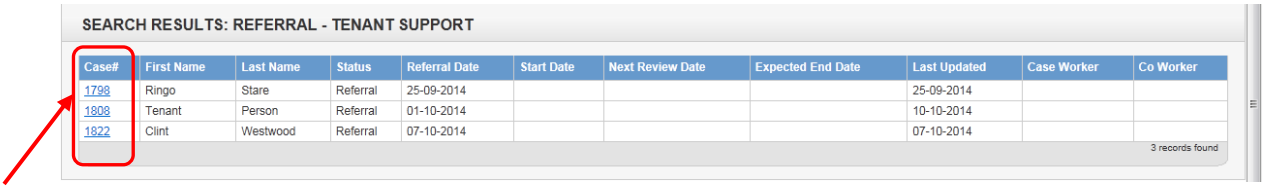
Agency Case Summary	Description	Action
Referral	A new referral that has been lodged by the Housing Office.	Review case details and record a referral outcome.
Waitlist for Assessment	Case is Waitlisted for Assessment	Monitor waitlist, record referral outcome when the case is able to be assessed.
Under Assessment	Case is currently having an assessment completed.	Assign a case-worker to the case. Complete assessment and record assessment outcome.
Waitlisted	Cases that have had an assessment completed but a waitlisted for commencement onto STEP.	Monitor waitlist.
Case Open	Open Cases assigned to the Caseworker/Co-worker.	-

Search Results

The *Search Results* section displays cases as indicated in the *Agency Case Summary*. For example to see the cases under "*Referral – Tenant Support"*, click on the "*Total".*

Agency Case Summary	Total
Referral - Tenant Support	3
Referral - High / Intensive Tenant Support	1
Waitlist for Assessment - Existing Tenant	13
Waitlist for Assessment - Tenant Support	1
Under Assessment - Existing Tenant	48
Waitlisted - Existing Tenant	11
Waitlisted - Tenant Support	1
Case Open - Existing Tenant	58
Case Open - Tenant Support	13

The cases are then displayed in the "*Search Results"* area. To open the case, click on the Case #



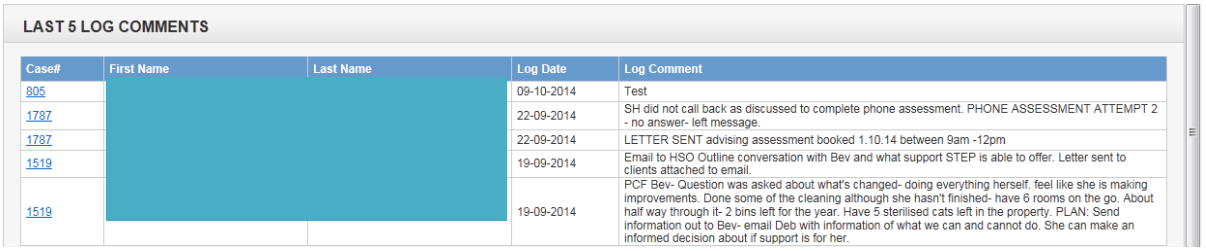
SEARCH RESULTS: REFERRAL - TENANT SUPPORT

Case#	First Name	Last Name	Status	Referral Date	Start Date	Next Review Date	Expected End Date	Last Updated	Case Worker	Co Worker
1798	Ringo	Stare	Referral	25-09-2014				25-09-2014		
1808	Tenant	Person	Referral	01-10-2014				10-10-2014		
1822	Clint	Westwood	Referral	07-10-2014				07-10-2014		

3 records found

Last 5 Log Comments

The Last 5 Log Comments made to cases are displayed in this area.



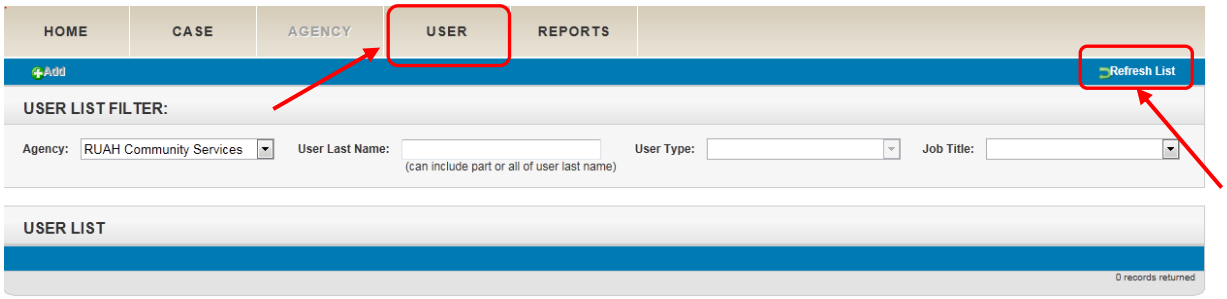
LAST 5 LOG COMMENTS

Case#	First Name	Last Name	Log Date	Log Comment
805	[redacted]	[redacted]	09-10-2014	Test
1787			22-09-2014	SH did not call back as discussed to complete phone assessment. PHONE ASSESSMENT ATTEMPT 2 - no answer- left message.
1787			22-09-2014	LETTER SENT advising assessment booked 1.10.14 between 9am -12pm
1519			19-09-2014	Email to HSO Outline conversation with Bev and what support STEP is able to offer. Letter sent to clients attached to email.
1519			19-09-2014	PCF Bev- Question was asked about what's changed- doing everything herself. feel like she is making improvements. Done some of the cleaning although she hasn't finished- have 6 rooms on the go. About half way through it- 2 bins left for the year. Have 5 sterilised cats left in the property. PLAN: Send information out to Bev- email Deb with information of what we can and cannot do. She can make an informed decision about if support is for her.

USER - Menu Option

STEP Providers with *Agency Manager* access will be able to update individual STEP user's access once the user has been set up in STEPIMS.

Click on the *User* menu option and the *User List Filter* screen displays.

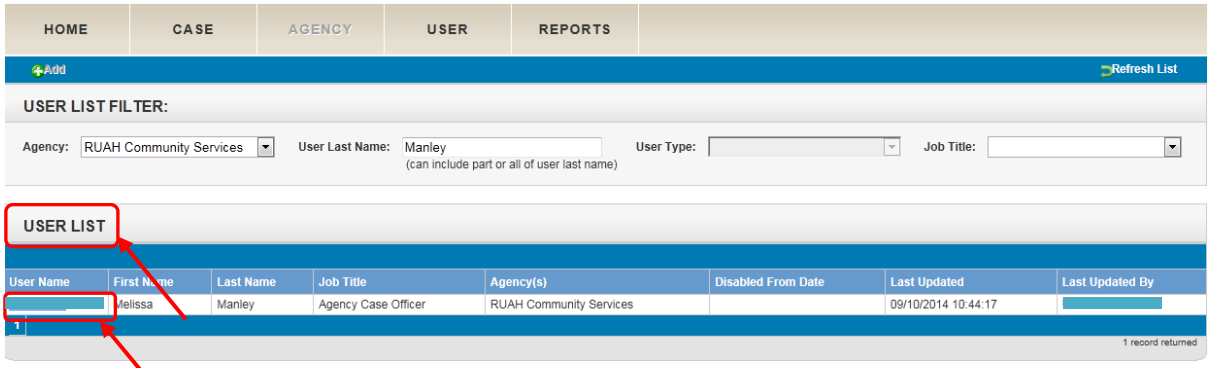


User List Filters

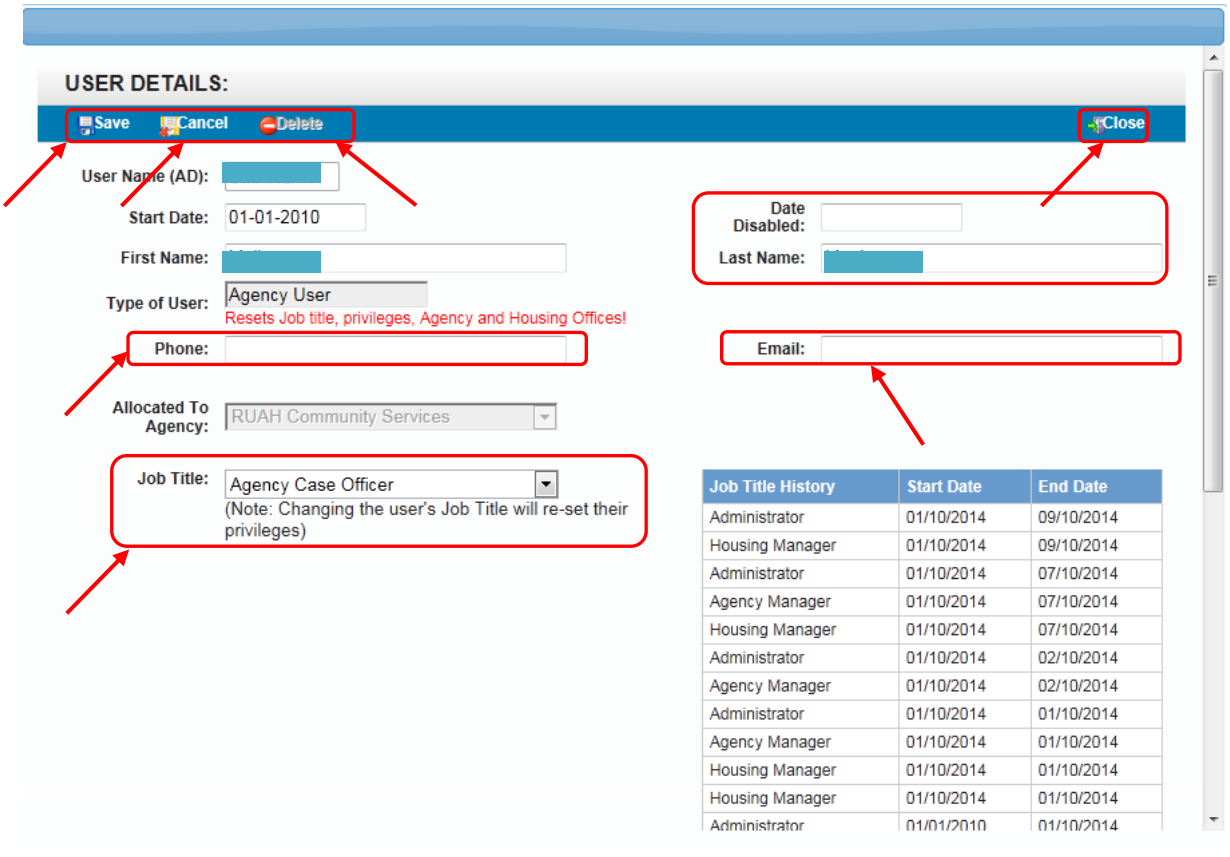
The *User List Filter* allows you to search for STEP users using the provided search criteria e.g.

- *User Last Name*
- *User Type* (greyed out as used only by Administrators)
- *Job Title*

Click the *Refresh List* icon to find users that match the recorded criteria. The *Search Results* are then displayed in the *User List*.



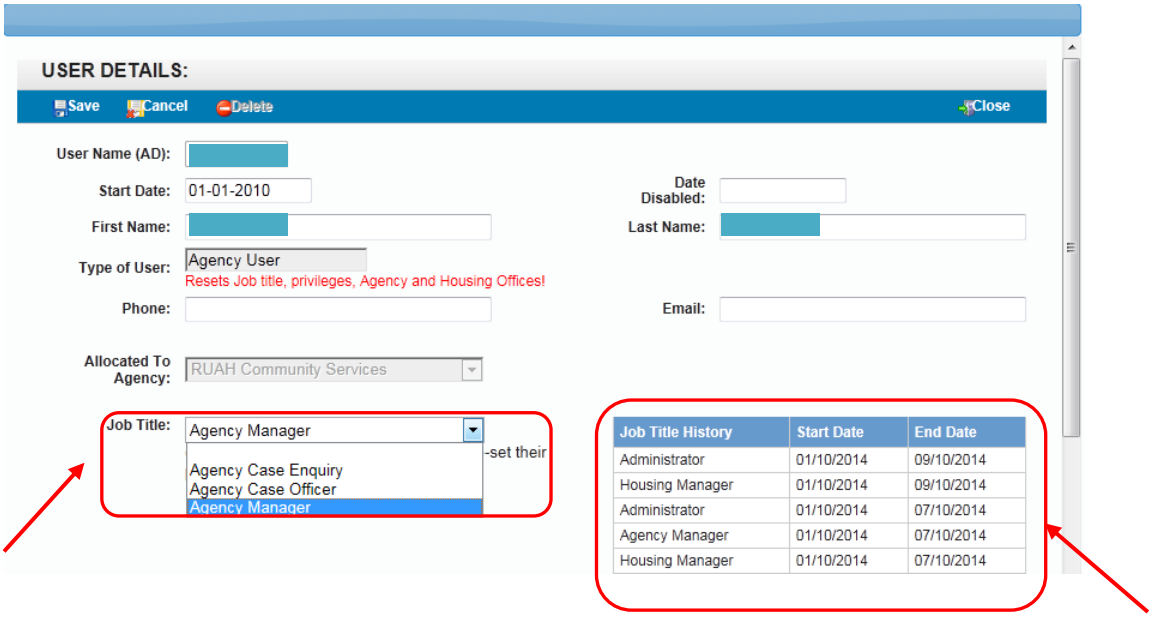
Click on the *User Name* to go into the *User Details* screen.



Agency Managers can disable user accounts (e.g. if the staff member is on long term leave, or has left the agency). They can also update phone number and email details of workers.

Note: Unlike the *Case* screen, the *Save* button is on the top left of the banner instead of the top right.

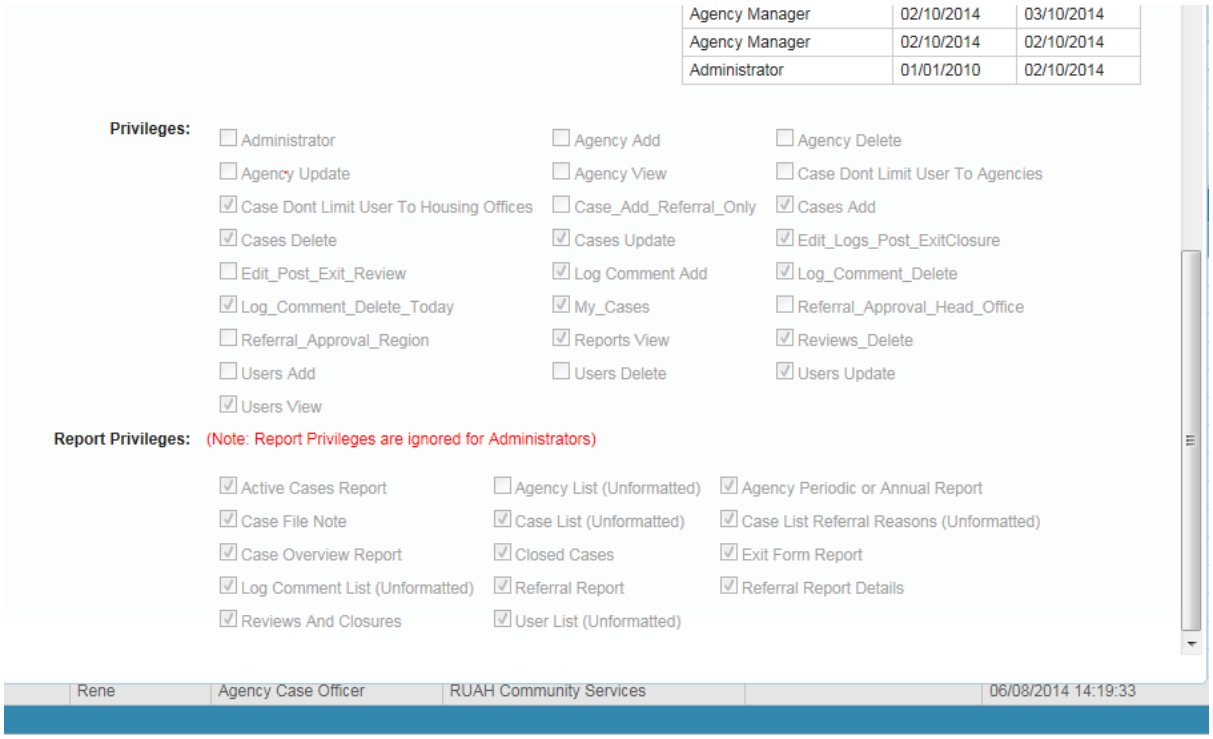
Agency Managers can also change the user's *Job Title* by making a selection from the drop-down box. This will re-set their *Privileges* within STEPIMS.



Job Title History

The *Job Title History* displays the history of the user and provides the duration of when they had particular access levels to STEPIMS.

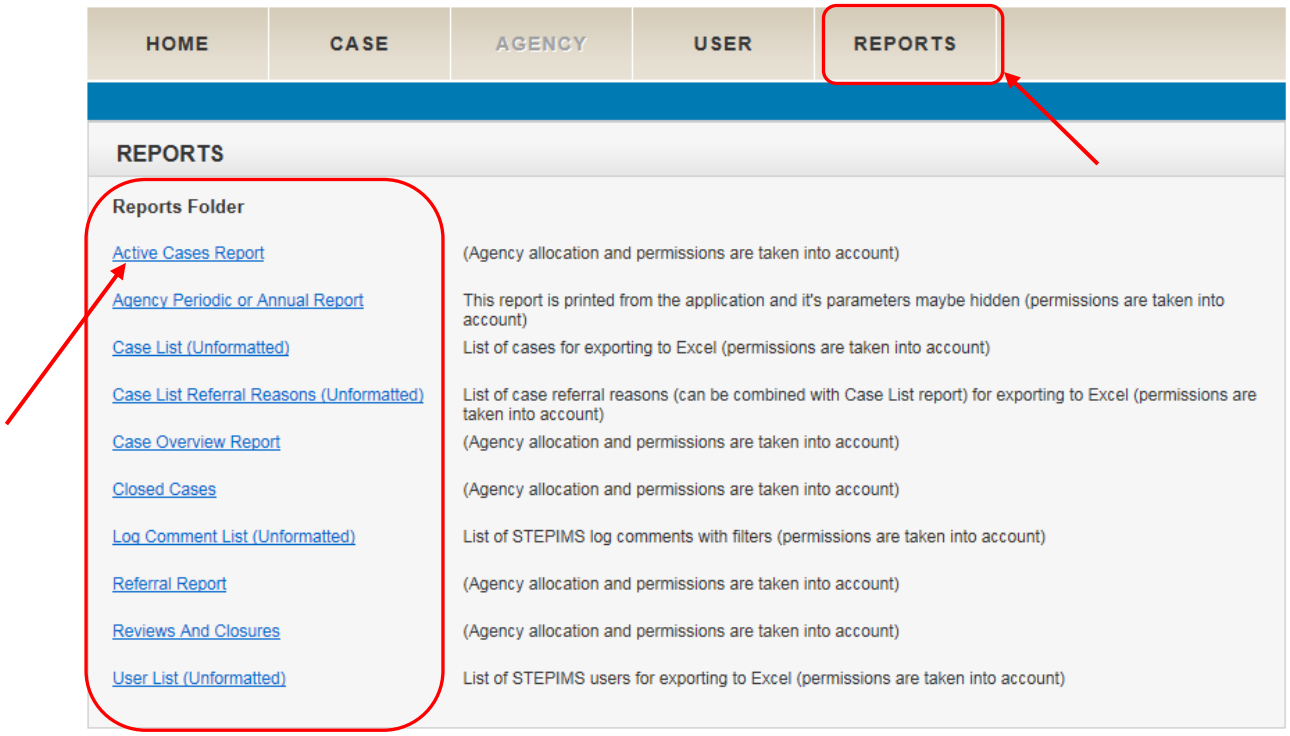
The *Privileges* and *Report Privileges* have default settings for each *Job Title*. When the *Job Title* is changed so will the *Privileges* and *Report Privileges*



REPORT - Menu Option

STEP Providers with *Agency Manager* access can view and print various reports for analysis.

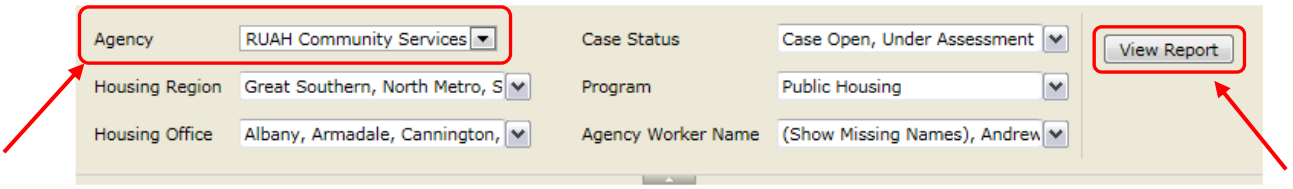
Click on the *Report* menu option and the *Reports* screen displays.


HOME
CASE
AGENCY
USER
REPORTS
REPORTS
Reports Folder
Active Cases Report
(Agency allocation and permissions are taken into account)
Agency Periodic or Annual Report
This report is printed from the application and it's parameters maybe hidden (permissions are taken into account)
Case List (Unformatted)
List of cases for exporting to Excel (permissions are taken into account)
Case List Referral Reasons (Unformatted)
List of case referral reasons (can be combined with Case List report) for exporting to Excel (permissions are taken into account)
Case Overview Report
(Agency allocation and permissions are taken into account)
Closed Cases
(Agency allocation and permissions are taken into account)
Log Comment List (Unformatted)
List of STEPIMS log comments with filters (permissions are taken into account)
Referral Report
(Agency allocation and permissions are taken into account)
Reviews And Closures
(Agency allocation and permissions are taken into account)
User List (Unformatted)
List of STEPIMS users for exporting to Excel (permissions are taken into account)

To run a report click on the link on the left side of the screen. In the *Agency* field select your Agency.

Note: *The other fields automatically revert to their default settings.*

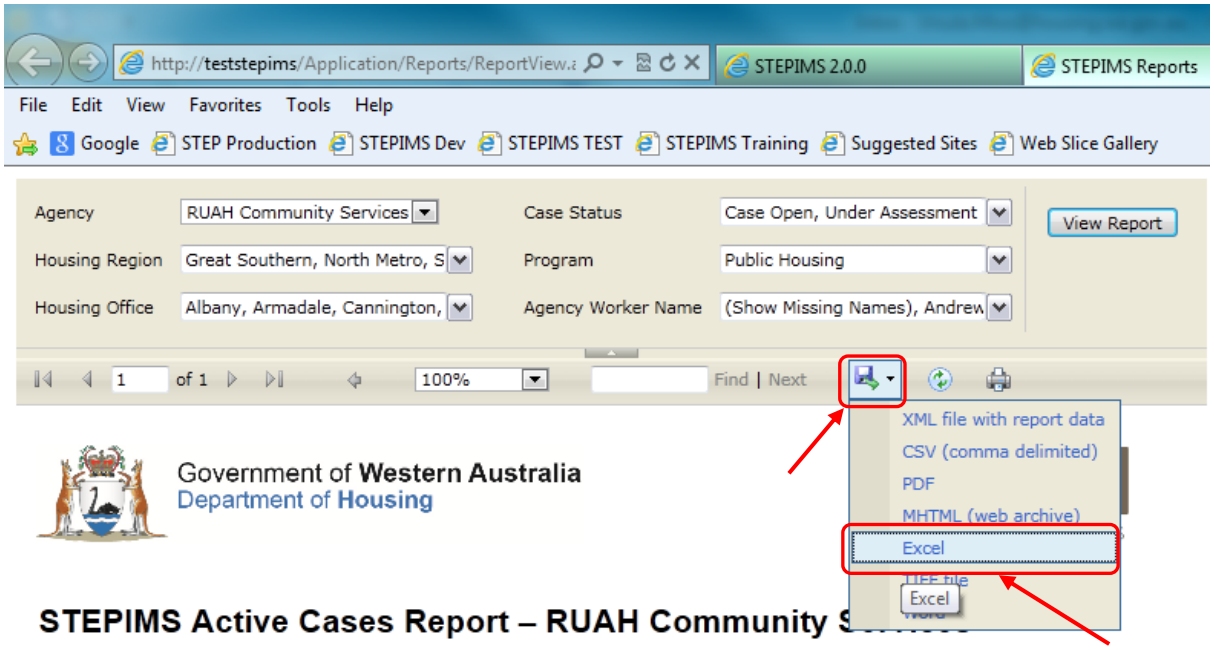
You can select from the drop-down options to tailor the report.



To view the report, click on the *View Report*

button. The *Report* displays.

To view the *Report* in Excel, click on the icon and then select Excel.



Government of **Western Australia**
Department of **Housing**

STEPIMS Active Cases Report – RUAH Community S

Printed by Ursula Moss on 09/10/2014

Case Status: Case Open, Under Assessment

Agency Worker Name: [redacted]

Program: Public Housing

Housing Region: Great Southern, North Metro, South East Metro, South Metro

Housing Office: Albany, Armadale, Cannington, Fremantle, Joondalup, Katanning, Kwinana, Mandurah, Midland, Mirrabooka, Victoria Park, Wellington Street

Agency Worker:	Open Cases	Under Assessment	Total
[redacted]	2	2	4
[redacted]	6	3	9
	0	28	28
[redacted]	0	6	6
[redacted]	9	5	14

The following table provides a description for each *Report* that can be produced.

Report Title	Report Description
Active Cases Report	A detailed summary of *Open Cases* and cases *Under Assessment*.
Agency Periodic or Annual Report	Report for the purpose of the 6 monthly and annual reporting, including current case status, completed case outcomes and total case equivalents.
Case List (Unformatted)	A spreadsheet containing raw data of each case on STEPIMS.
Case List Referral Reasons (Unformatted)	A spreadsheet containing the *Referral Reasons* for each case.
Case Overview Report	A snapshot of the current *Status* of all cases in a financial year.
Closed Cases	An overview of the outcome of *Cases Closed* or *Terminated Early* within a date range.
Log Comment List (Unformatted)	A spreadsheet containing all *Case Log Comments*.
Referral Report	Details of all cases currently in *Proposed Referral, Referral, Waitlist for Assessment* or *Waitlist status*.
Reviews and Closures	Cases where the *Next Review Date* or *Expected End Date* is within the date range entered. Please note, this report does not indicate if a review has been completed or is overdue.
User List (Unformatted)	List of *STEPIMS Users* associated with the agency/housing office.